
Welcome to...

Request for Quotation/Quotation

Welcome and Introductions



Course Prerequisites



- ✓ Change Discussions
- ✓ RWD SAP 4.6C



Course Objectives



- At the end of this course, individuals should be able to use SAP to:
 - Perform Pre-Solicitation Activities
 - Perform Solicitation Activities
 - Evaluate Offers



Benefits of Request for Quotation/Quotation



■ SAP provides an automated means to:

- Prepare solicitations
- Communicate solicitations
- Evaluate quotes and proposals



Course Schedule



<u>Agenda Item</u>	<u>Time (hr)</u>
1. Introduction	00:15
2. Background	00:10
3. Topic 1: Generate Solicitation	01:45
4. Topic 2: Amend and Cancel Solicitation	00:40
5. Topic 3: Evaluate Offers	00:30
6. End of Course Review/Feedback	00:10
Total Course Time	03:30 hrs



Course Structure



- Process Flows
 - Overview of key business processes and related SAP concepts
- Demonstrations
 - Trainer-led examples of key SAP transactions
- Exercises
 - Real-life business tasks using Core Financial business procedures
- Training Course Feedback
 - Assessment of course effectiveness using the on-line training course feedback form



Course Tool: On-Line Quick Reference



- Purpose of the On-Line Quick Reference (OLQR) tool:
 - Provide procedures, job aids, and Help content via the Intranet
 - Assist during and after Instructor-Led Training (ILT) and Web-Based Training (WBT)



Prepare Your Workspace



- Take a few minutes to prepare your training workspace:
 - Review the reference materials; become familiar with the content
 - Logon to SAP R/3



Background Knowledge

Background Knowledge



- Key definitions:

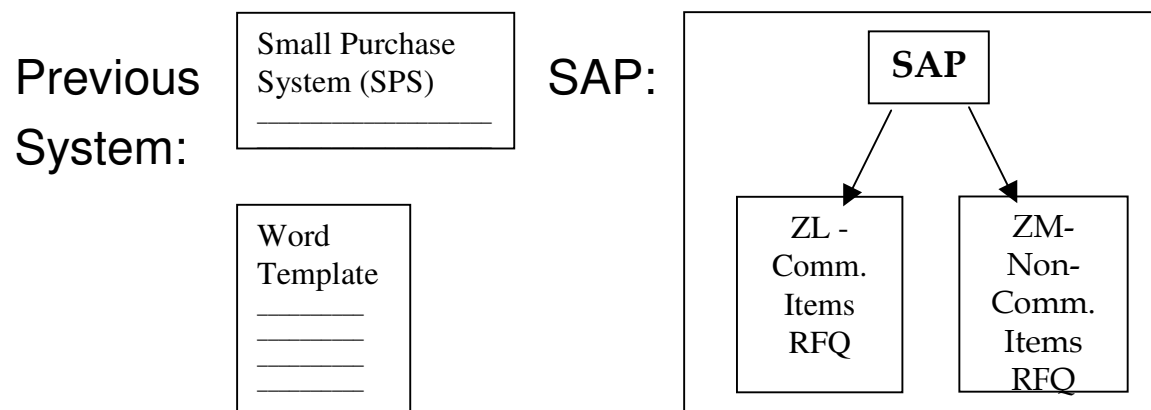
- **RFQ:** In SAP, this term refers to any type of solicitation including: Invitation for Bids (IFB), Cooperative Agreement Notice (CAN), NASA Research Announcement (NRA), Commercial Item Solicitation, Announcement of Opportunity (AO), Request for Offer (RFO), Request for Proposal (RFP), and Construction Non-Midrange Solicitation.
- **Collective Number:** This is the solicitation number. The format for the collective number is a two digit FY-three digit Pgroup-three digit Sequence number (e.g., 02-M11-001).
- **Quote:** An offer received in response to a solicitation that is entered in SAP.



Background Knowledge



- Differences between SAP and the previous system:
 - RFQ templates contained within SAP



- Standardized solicitation number

Previous System: 8-1-0-05-18684, MSFC-IFB-0-0205

SAP: **02-M11-001, 02-M11-002**

Topic 1

Generate Solicitation

Topic 1: Overview



- Generate Solicitation
 - Maintain electronic record of the solicitation
 - Communicate the solicitation to vendors
- Process Flows: Perform Pre-Solicitation Activities and Solicit Offers
 - After completion of Initiate Acquisition Request sub-process activities



Topic 1: Objectives

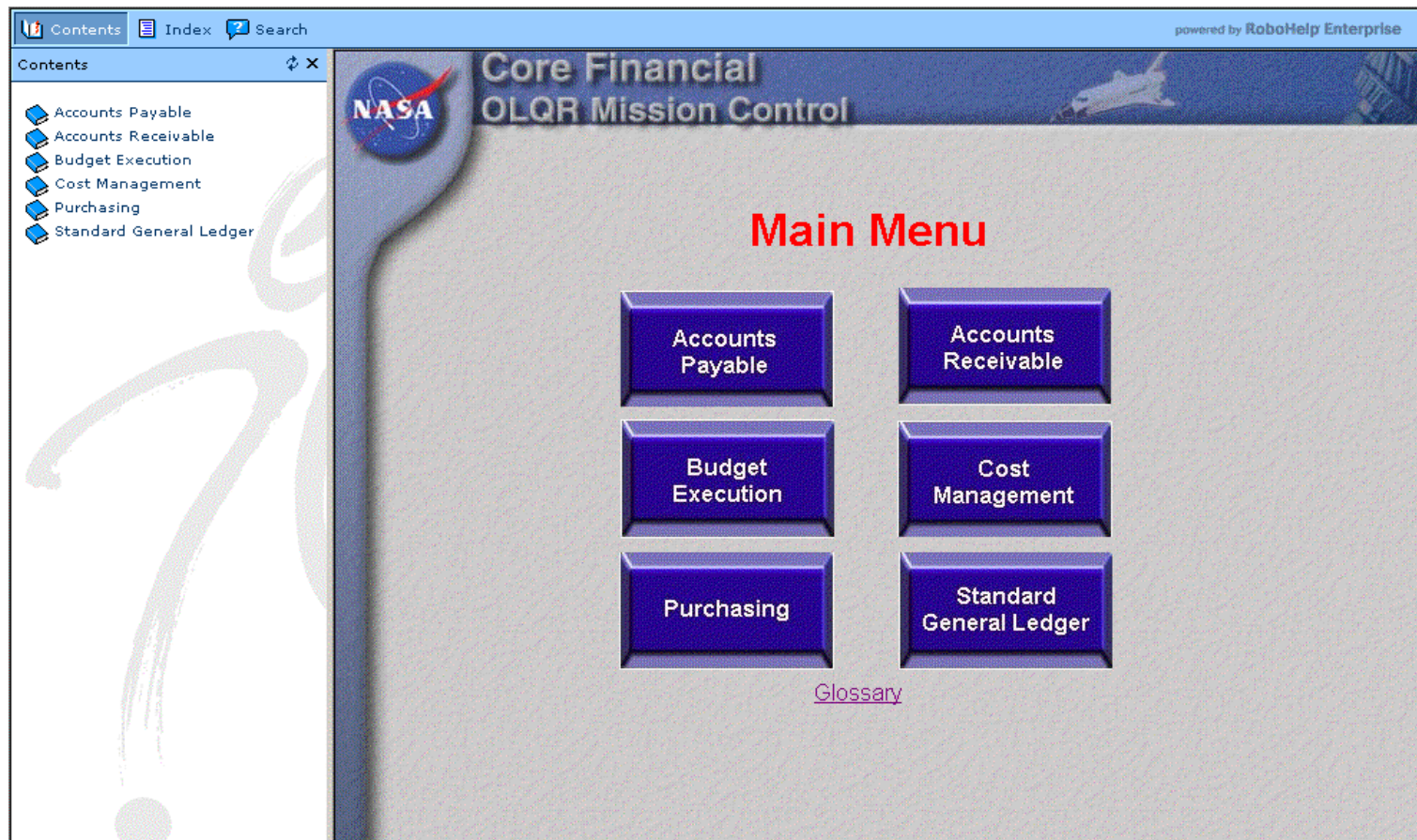


- Upon completion of Generate Solicitation, individuals should be able to accomplish the following:
 - Describe the Process Flow
 - Assign Buyer
 - Perform Market Research
 - Review Estimated Value
 - Generate Solicitation Document
 - Communicate Solicitation

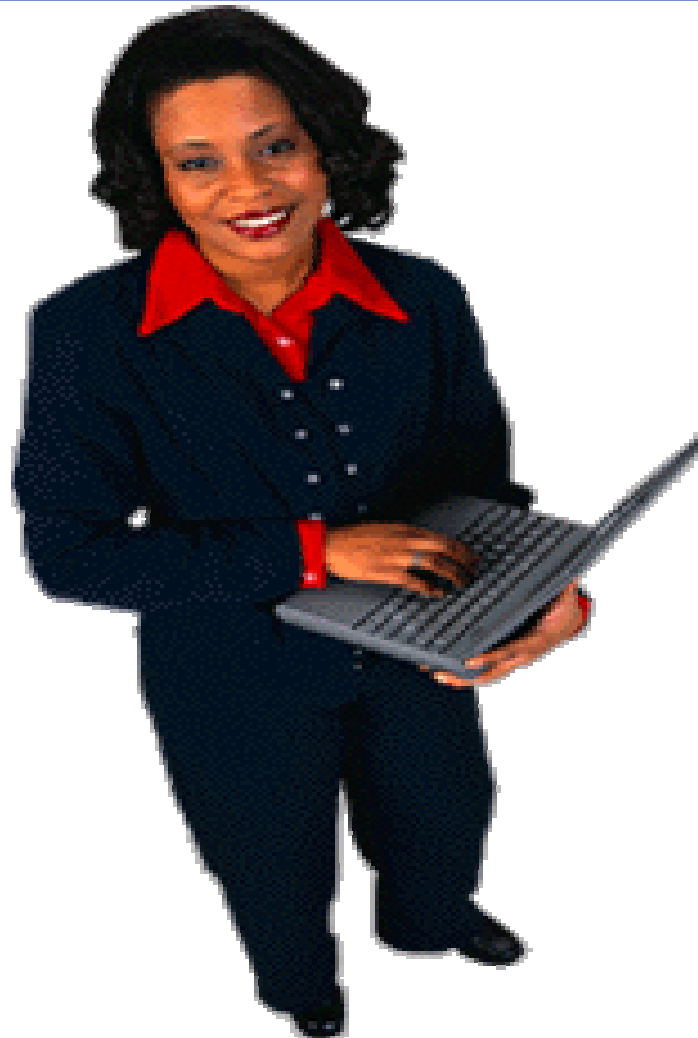


Topic 1: Process Flow

- Perform Pre-Solicitation Activities and Solicit Offers Process Flows

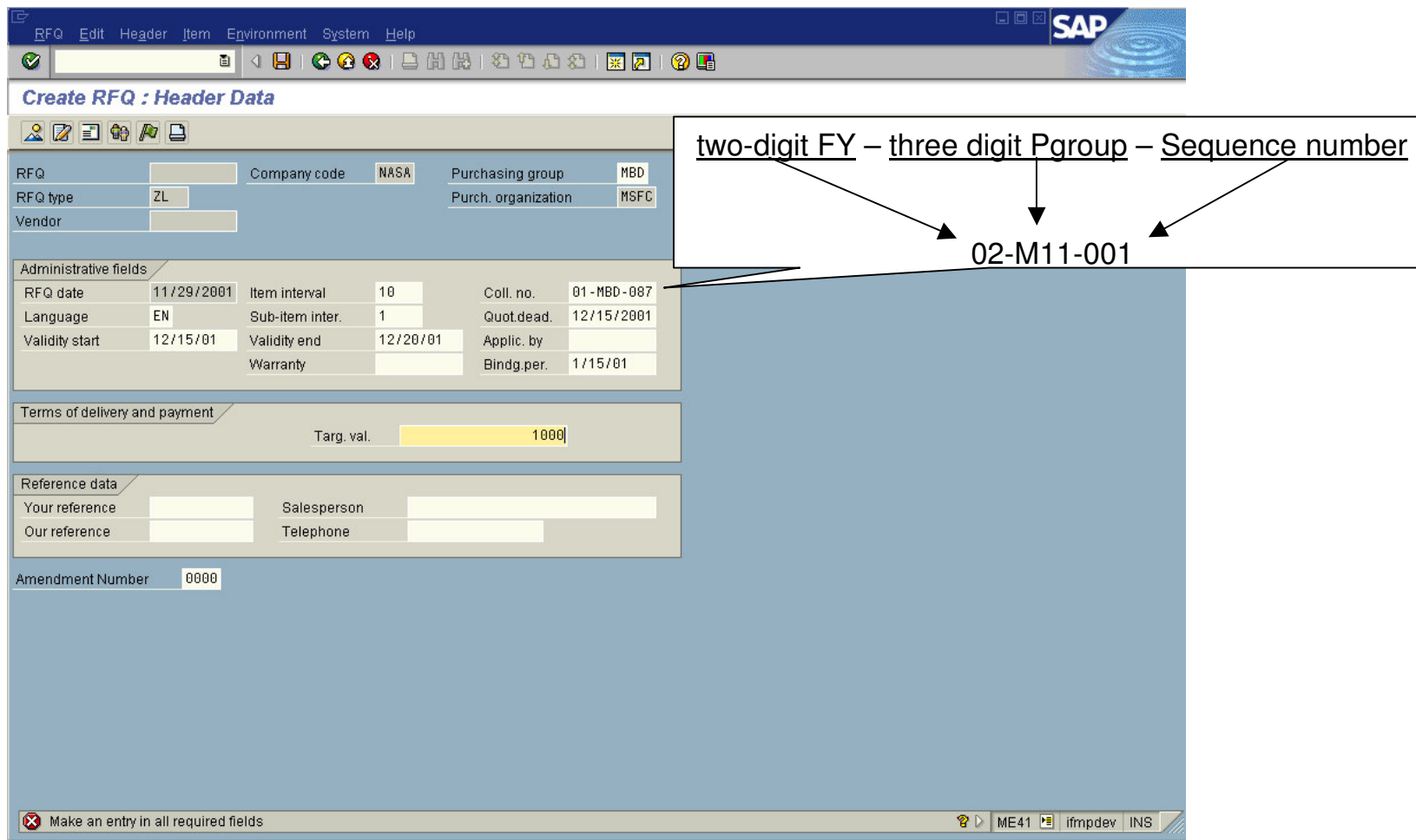


Demonstrations and Exercises Introduction



Screenshot

- Header detail screen: Collective Number



The screenshot shows the SAP 'Create RFQ : Header Data' screen. The 'Coll. no.' field contains the value '01-MBD-087'. A callout box points to this field with the text 'two-digit FY - three digit Pgroup - Sequence number' and the example '02-M11-001'.

Administrative fields			
RFQ date	11/29/2001	Item interval	10
Language	EN	Sub-item inter.	1
Validity start	12/15/01	Validity end	12/20/01
		Warranty	
Coll. no.	01-MBD-087	Quot. dead.	12/15/2001
		Applic. by	
		Bindg. per.	1/15/01

Terms of delivery and payment	
Targ. val.	1000

Reference data	
Your reference	Salesperson
Our reference	Telephone

Amendment Number: 0000

Make an entry in all required fields

ME41 ifmpdev INS

Demonstrations and Exercises



- Assign Buyer
- Perform Market Research and Review Estimated Value
- Generate Solicitation Documents
- Communicate Solicitation

Topic 1 Debrief



- The Procurement Team Lead assigns a buyer.
- The Buyer performs the market research and reviews the estimated value.
- The Buyer prepares the draft RFP and generates a Solicitation Document.
- The Contracting Officer communicates the draft RFP and the solicitation.



Topic 2

Amend and Cancel Solicitation

Topic 2: Overview



- Amend and Cancel Solicitation
 - Changes in requirements
 - Responses to questions regarding solicitations
 - Unresolved issues and no attainment of approvals
- Process Flows: Perform Pre-Solicitation Activities and Solicit Offers
 - After completion of Initiate Purchase Request sub-process activities



Topic 2: Objectives



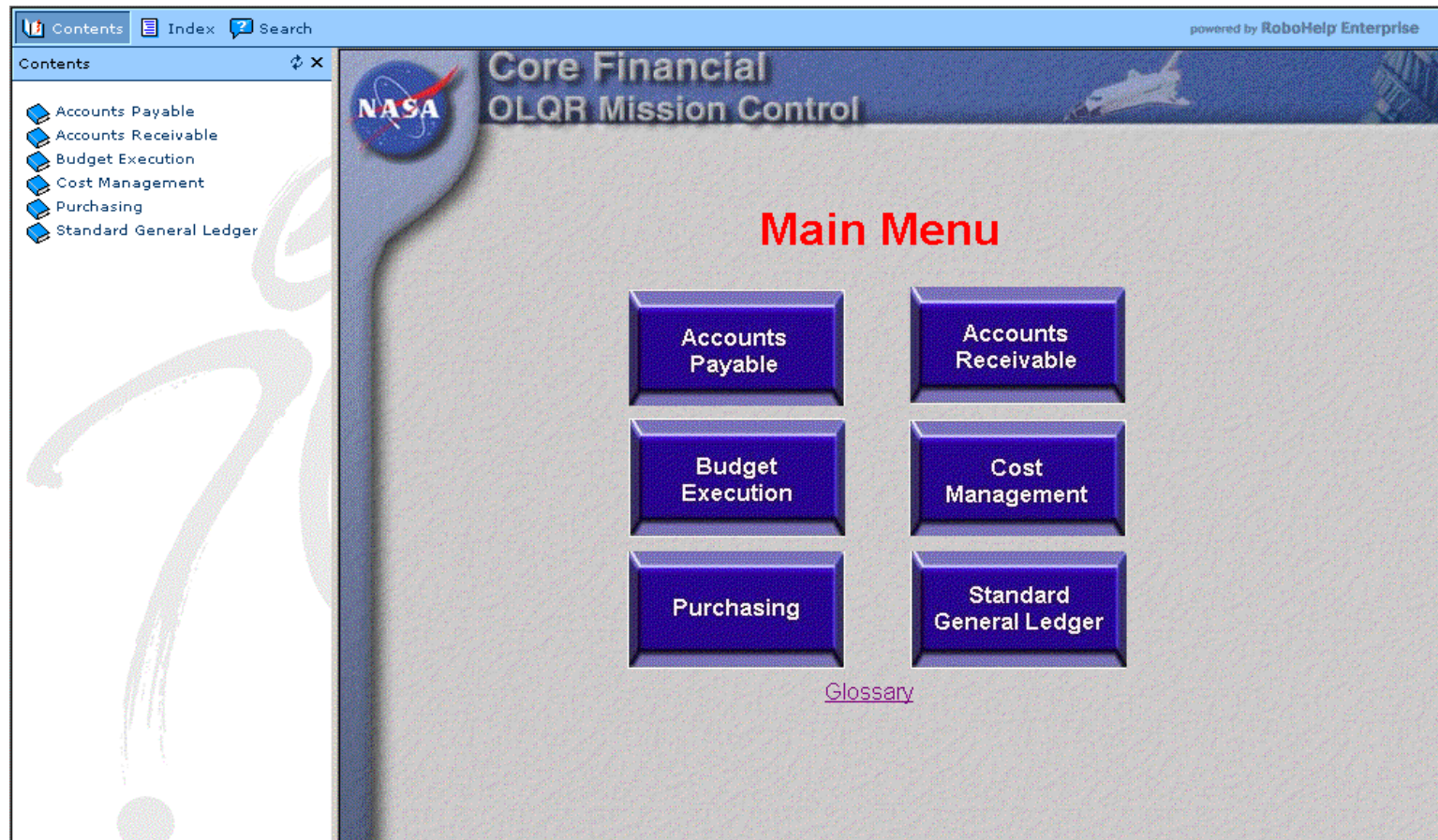
- Upon completion of Request for Quotation/Quotation, individuals should be able to accomplish the following:
 - Describe the Process Flow
 - Amend Solicitation
 - Communicate Solicitation Amendment
 - Cancel Solicitation Amendment
 - Cancel Solicitation



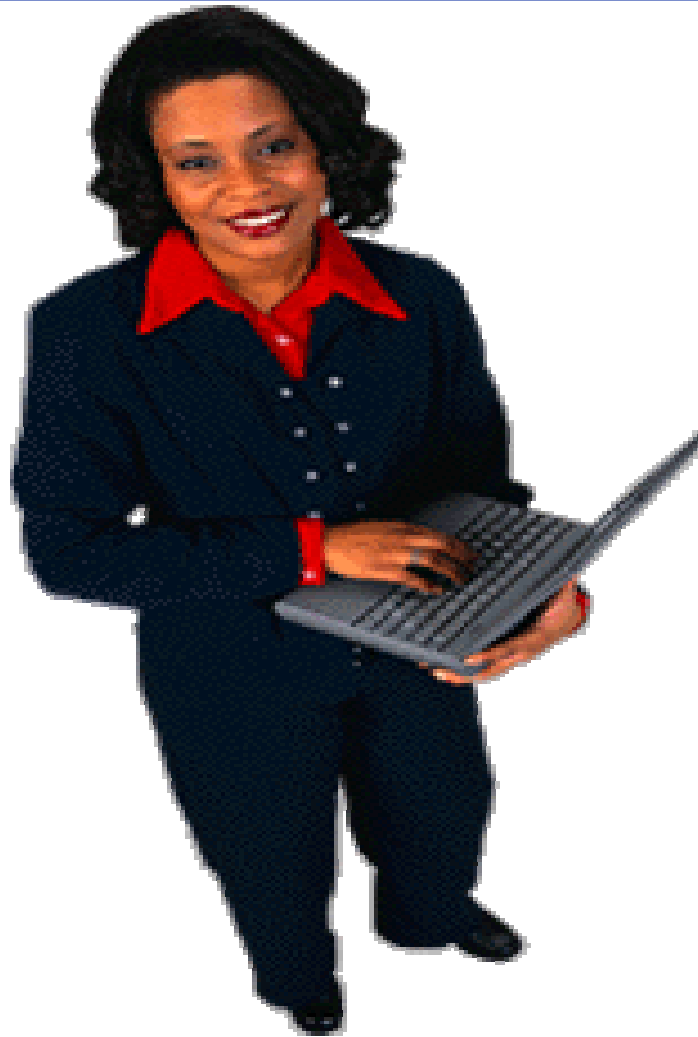
Topic 2: Process Flow



- Perform Pre-Solicitation Activities and Solicit Offers Process Flows



Demonstrations and Exercises Introduction



Screenshot



- Header detail screen: Change History

Changes to RFQ 6000000394 Item 00010

Person resp.	Date	Time	Transaction	Change document
Doc. header 6000000394				
Item 00010				
GEORGRA	12/18/2001	14.35.47	ME42	18375
AEDAT Purchasing document item change date Changed				
Old: 10/09/2001				
New: 12/18/2001				
KTMNG Target quantity Changed				
Old: 1.000 EA				
New: 5.000 EA				
Sch. line 0001				
GEORGRA	12/18/2001	14.35.47	ME42	18375
EINDT Item delivery date Changed				
Old: 11/19/2001				
New: 01/07/2002				
MENGE Scheduled quantity Changed				
Old: 1.000 EA				
New: 5.000 EA				
SLFDT Statistics-relevant delivery date Changed				
Old: 11/19/2001				
New: 01/07/2002				

Demonstrations and Exercises



- Amend Solicitation
- Communicate Solicitation Amendment
- Cancel Solicitation Amendment
- Cancel Solicitation
- Receive Proposals
- Perform Evaluation



Topic 2 Debrief



- The Buyer amends the solicitation.
- The Contracting Officer communicates the solicitation amendment.
- The Buyer cancels the solicitation amendment.
- The Buyer cancels the solicitation.



Topic 3

Evaluate Offers

Topic 3: Overview



- Evaluate Offers
 - Price Comparison
- Process Flow: Evaluate Offers
 - After completion of Perform Pre-Solicitation Activities and Solicit Offers



Topic 3: Objectives

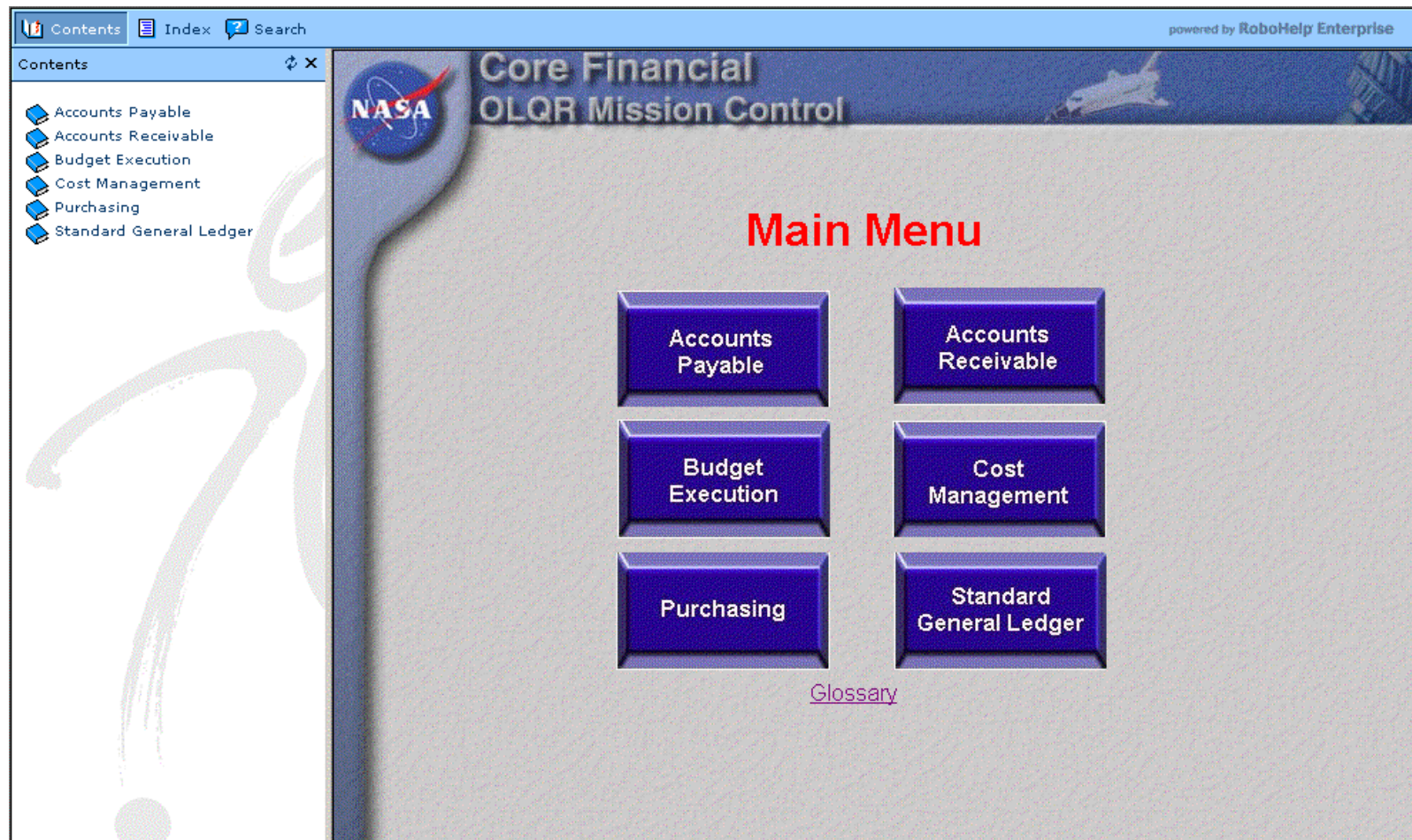


- Upon completion of Request for Quotation/Quotation, individuals should be able to accomplish the following:
 - Describe the Process Flow
 - Receive Proposals
 - Perform Evaluations



Topic 3: Process Flow

- Evaluate Offers Process Flow



Demonstrations and Exercises Introduction



Screenshot



- Price Comparison List screen

SAP

Price Comparison List in Currency USD

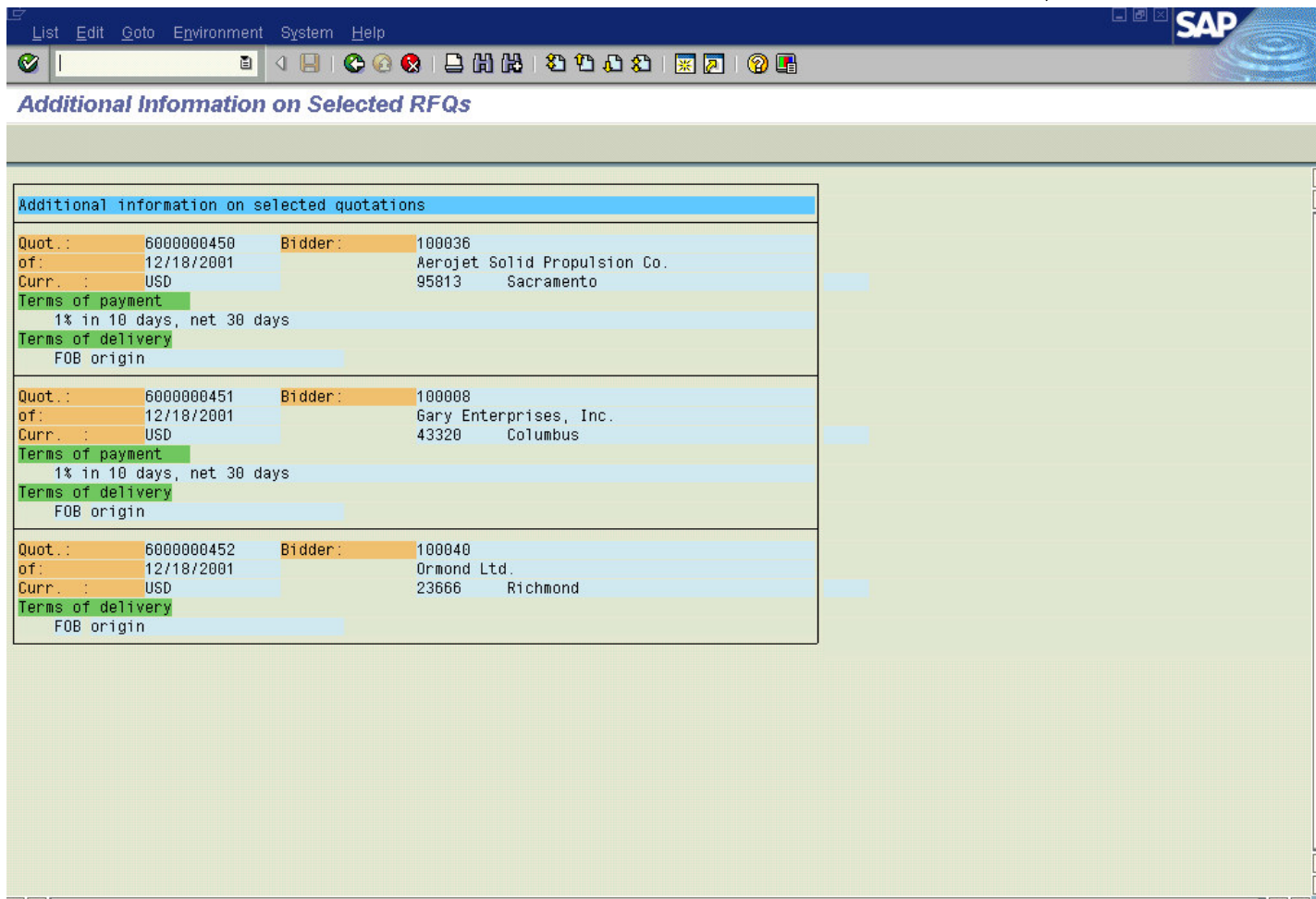
Quotation Vendor Additional info

Material Mat. group	Quot.:	6000000450	6000000451	6000000452
Shrt txt	Bidder:	100036	100008	100040
Qty. in base unit	Coll. no.:	RENETRNG	RENETRNG	RENETRNG
10	Val.:	5.00	12.50	15.00
test for training mate	Price:	1.00	2.50	3.00
5 EA	Rank:	1 46 %	2 115 %	3 139 %
Total quot.	Val.:	5.00	12.50	15.00
	Rank:	1 46 %	2 115 %	3 139 %



Screenshot

- Additional Information on Selected RFQs



The screenshot displays the SAP interface for 'Additional Information on Selected RFQs'. The window title is 'SAP' and the menu bar includes 'List', 'Edit', 'Goto', 'Environment', 'System', and 'Help'. The toolbar contains various icons for file operations and navigation. The main content area is titled 'Additional information on selected quotations' and lists three entries:

Additional information on selected quotations	
Quot.: 6000000450	Bidder: 100036
of: 12/18/2001	Aerojet Solid Propulsion Co.
Curr.: USD	95813 Sacramento
Terms of payment: 1% in 10 days, net 30 days	
Terms of delivery: FOB origin	
Quot.: 6000000451	Bidder: 100008
of: 12/18/2001	Gary Enterprises, Inc.
Curr.: USD	43320 Columbus
Terms of payment: 1% in 10 days, net 30 days	
Terms of delivery: FOB origin	
Quot.: 6000000452	Bidder: 100040
of: 12/18/2001	Ormond Ltd.
Curr.: USD	23666 Richmond
Terms of delivery: FOB origin	

Topic 3 Debrief



- The Buyer receives the proposals and enters the quotes.
- The Buyer performs the evaluation in SAP.



End of Course Review

Review Objectives & Expectations



Individuals here should now be able to:

- ✓ Perform Pre-Solicitation Activities
- ✓ Perform Solicitation Activities
- ✓ Evaluate Offers

Available Resources



- SAP Practice Training Instance
- OLQR
- Super-users within each department
- Job Aids



Extra Practice - SAP Training Instance



- Use data from course training guide to practice transactions

The training database provides a “safe” environment to develop and practice skills without affecting production.

Congratulations!

Training Course Feedback



- The on-line training course feedback will:
 - Assess the effectiveness of the instruction and training materials for the course
- To access the feedback form:
 - Launch your Web Browser
 - Enter the following URL address:
<http://www.zoomerang.com/recipient/survey-intro.zgi?ID=S92WBAWLSKWA&PIN=994RHHDW8RK7>
 - Complete and submit feedback by following the directions within the on-line form

